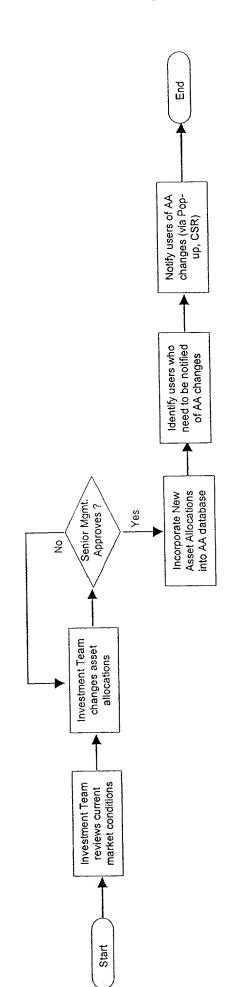
Process Flows



Process Flows End Notify users of one-click changes (via Pop-up, CSR) Identify users who need to be notified of one-click changes Z 2.1.7.3 Manage One-Click Diversification Changes* mutual funds into one-click database Incorporate New Senior Mgmt. Approves? Yes g Investment Team changes one-Investment Team reviews current one-click diversifications Start

Process Flows

ш Notify users of fund changes (via Pop-up, CSR) Identify users who need to be notified of fund changes Incorporate New funds into mutual fund database Senior Mgmt. Approves? Yes 2 Investment Team changes mutual fund list Investment Team reviews current mutual fund offerings Start